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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

We've all been hearing about artificial intelligence-powered wealthtech firms for years now. One of the most common sales pitches I've encountered relates to time savings. I was curious: Which pieces of tech are actually saving time? And what are firms doing with those "extra" hours? I spoke with several advisors about their experiences.

Has AI saved you time? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

How much time is AI saving advisors? And how do they spend it?

New tools help financial advisors with everything from logic to transcription, but many say it's not just about winning back minutes but also the quality of the output.

- **Advisors clamor for estate planning tools as attorneys wave red flags**
  Adoption of these applications has grown exponentially, but some advisors and attorneys say caution is warranted.
- **Clients value advisor relationships over investment advice, study shows**
  The inaugural "Wealthtender Voice of the Client Study" found that 89% of client reviews focus on relationships and emotional trust, while only 10% were focused on investment management.
- **What Facet has gained building its tech stack from scratch**

Anders Jones, CEO and co-founder, took the time to discuss the benefits of building tech in-house, how they are using AI and what they would change if they could.

- **The AI split: Half of firms embrace the tech, while half hesitate**
  Advisors across the spectrum of AI adoption said that while the emerging technology presents potential gains, there are still worries.

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